The Fidelity Charitable Trustees’ Initiative ensures that nonprofits have the resources they need to build thriving organizations and improve their communities. We do this by funding organizations that strengthen the infrastructure that supports nonprofits and the social sector overall. **We help those who help nonprofits.**

*The Initiative is separate from the Fidelity Charitable donor-advised fund program.*

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A message from the Board of Trustees and the Vice President

The challenges of the past several years have shown us how dynamic and resilient nonprofits can be. But these volatile times have continued to stretch the social sector—and those who work in it—very thin. Nonprofits continue to face ripple effects from the pandemic, such as rising costs, increased demand for services and staff retention challenges—and they often aren’t staffed or funded to be able to invest in their own people or support systems. Investment in social sector infrastructure can help nonprofits thrive, despite the burdens of uncertain times.

Social sector infrastructure is the support system that nonprofits rely on to help run effective, equitable, and responsive organizations.

This past year, by investing in social sector infrastructure organizations, the Fidelity Charitable Trustees’ Initiative helped leaders learn how to prevent staff burnout, helped board members navigate conversations about racial equity, helped donors identify new organizations to give to in response to crises, and helped the sector as a whole advocate for financial resources to stay afloat amid rising inflation.

Our approach to funding: We listen for what challenges nonprofits are facing and what opportunities there are to address these challenges. We fund organizations that reach thousands of nonprofits and donors. This past year, the Fidelity Charitable Board of Trustees was proud to provide more than $9 million to support 38 unique organizations. These nonprofits provided professional development and support to tens of thousands of other nonprofits. They also activated individual donors—the primary source of philanthropic funding for nonprofits—to give with confidence.

For a nonprofit addressing urgent needs, such as disaster relief, homelessness or climate change, thinking about—let alone investing in—infrastructure improvements can feel like a luxury that isn’t available. That’s why funding this work is both essential and powerful; strong infrastructure amplifies the work of any organization and supports its staff to continue to grow and succeed, no matter what comes next.

“The Fidelity Charitable Trustees’ Initiative ensures that nonprofits have the resources they need to build thriving organizations and improve their communities. We help those who help nonprofits.”

– Audrey Gillis
Senior Vice President of Advancement,
Institute for Nonprofit Practice;
Fidelity Charitable Trustees’ Initiative grantee
Fidelity Charitable Trustees’ Initiative Funding

2022 by the numbers

42 grants to 38 grantees, totaling more than $9M

Since inception, the Fidelity Charitable Trustees’ Initiative has made grants totaling more than $64M

70% of grants are multi-year funding commitments*

68% of grants go to general operating funding*

2022 GRANTS

$5M Nonprofit strengthening

$2.7M Donor effectiveness

$930K Sector knowledge and advocacy

$555K Special opportunities for disaster relief

*does not include special opportunity grants
The Fidelity Charitable Trustees’ Initiative is committed to ensuring nonprofits that have less access to resources get opportunities to advance their missions and improve their communities. We make three types of grants to holistically meet this goal: nonprofit strengthening, donor effectiveness, and sector knowledge and advocacy.

Nonprofit strengthening grants
These grants ensure that nonprofits have the talent, technology, and financial resources to fulfill their missions.

Advance organizational racial equity

**Borealis Philanthropy:** To support the Racial Equity to Accelerate Change Fund (REACH), which is focused on capacity building to advance racial equity within nonprofit organizations

**ProInspire:** General support as the organization helps nonprofit leaders build more racially equitable organizations

**Supporting racial equity**

Beyond making grants to organizations that help nonprofits improve their approaches to racial equity, and providing funding to organizations led by people of color, we also advance racial equity by:

- **ensuring** nonprofit staff of color get access to professional development opportunities
- **promoting** peer learning among leaders of color
- **encouraging** donors to support organizations that are led by, and serving, people of color, and are addressing racial disparities in the communities they serve.

Improve fundraising and financial management capacity

**Commonweal (Somos El Poder):** General support for Somos El Poder, a Latinx fundraising institute dedicated to educating, connecting, and empowering Latinx nonprofit staff responsible for fundraising

**First Nations Development Institute:** General support as the organization builds the financial and fundraising capacity of Native-led nonprofits and educates donors on how to effectively support Native-led nonprofits and tribal governments

**Propel Nonprofits:** To build and disseminate a toolkit for small to mid-sized nonprofits on accepting and managing cryptocurrency donations and to launch Financial Commons, a financial management resource hub for small to mid-sized nonprofits
Support leadership development and good governance

**BoardSource:** For organizational development support for the sector’s leading organization dedicated to improving board governance practices

**Institute for Nonprofit Practice:** General support as the organization launches the Black Leadership Institute and expands its nonprofit leadership development programs across the country to new leaders

**The Management Center:** General support to enable nonprofit leaders to have access to equitable management training and coaching

Expand technology skills and strengthen security

**NTEN:** To help nonprofits assess their technology needs and improve their cybersecurity practices

**University of California, Berkeley Foundation (Center for Long-Term Cybersecurity):** To expand the National Cybersecurity Clinic Consortium and connect university-based cybersecurity clinics with local nonprofits to strengthen their cybersecurity capacity

Strengthen the workforce

**Nonprofit Risk Management Center:** To provide planning support for a new human resources (HR) online resource center for nonprofit HR staff

**Human Services Providers Charitable Foundation:** General support for Massachusetts’ largest human services association as it strengthens the nonprofit human services workforce

Support for work that cuts across more than one program or theme

**North Carolina Center for Nonprofits:** General support for the leading capacity-building hub and policy advocate for nonprofits throughout North Carolina

**Rockefeller Philanthropy Advisors (Listen4Good):** To bolster Listen4Good’s scaling campaign as the initiative works with nonprofits to build sustainable, high-quality feedback loops with their clients

**Share Our Strength (Community Wealth Partners):** To support Community Wealth Partners to work with community foundations on funding BIPOC-led organizations and launch a capacity-building fund for BIPOC-led nonprofits

**Triangle Community Foundation:** To contribute to the Triangle Capacity-Building Network, which strengthens the Triangle area of North Carolina’s nonprofit ecosystem with capacity-building grants and professional development for nonprofit staff
Donor effectiveness grants
These grants ensure that individual donors have guidance and peer support to make their giving more informed, intentional, and inclusive.

Connect donors to give for community and systems change

**Allied Media Projects (Decolonizing Wealth Project):** General support for Decolonizing Wealth Project to work with donors to deploy resources and build capacity at Black- and Indigenous-led organizations and tribal communities

**Global Impact (Philanthropy Together):** General support for Philanthropy Together to build a global movement for democratizing philanthropy through giving circles

**National Center For Family Philanthropy:** General support for the national network of philanthropic families committed to learning and implementing informed and effective philanthropy

**Proteus Fund (Impact-Driven Philanthropy Collaborative):** General support for the Collaborative to encourage individual donors to improve the effectiveness of their giving

**Social Venture Partners International:** General support as the organization engages a global donor network in supporting racial and economic systems change

Mobilize financial resources to nonprofits

**Center for Disaster Philanthropy:** General support for the leading organization improving the effectiveness of disaster philanthropy for individual and institutional donors

**JustFund:** General support as the online grantmaking platform scales efforts to connect individual donors with nonprofits committed to racial equity
Sector knowledge and advocacy grants

These grants ensure that nonprofits have the data they need to understand the practices that are most effective and to advocate for the resources needed to improve their communities.

Support practical research

Community Foundation of Northeast Iowa (Initiative for Strategic Volunteer Engagement Fund):
To disseminate the Fund’s new research on the importance of investing in strategic volunteer engagement

Giving Tuesday:
To launch GivingPulse, a weekly survey designed to investigate a broad range of giving behaviors across the United States to ensure the entire social sector has access to timely data

Giving USA Foundation:
To support research for a study on donor-advised fund giving trends

New Venture Fund:
For the Infrastructure Research Collaborative’s effort to share key information with donors, nonprofits, and the public about social sector infrastructure

Support collaboration and policy change

Independent Sector:
To bring together a diverse community of changemakers at nonprofits, foundations, and corporate giving programs who are working to strengthen civil society
Special opportunity grants

Investing in the sector’s infrastructure is vital—so is reserving flexible funding to respond to disasters as they emerge. Each year, we reserve a certain amount of funding to help communities affected by natural disasters or humanitarian crises. We call these special opportunity grants.

Afghanistan refugee and veteran support
- CARE
- Partners Healthcare System

Haiti earthquake relief and recovery
- Economic Stimulus Projects for Work and Action

Hurricane Ida relief and recovery
- American National Red Cross

Kentucky tornadoes relief and recovery
- American National Red Cross
- Community Foundation of Western Kentucky
- United Way of Kentucky

Montana flooding relief and recovery
- Greater Gallatin United Way

New Mexico fire relief and recovery
- Santa Fe Community Foundation

Ukraine humanitarian crisis relief
- CARE
- HIAS
- Save the Children Federation
Fidelity Charitable Board of Trustees

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Alfred E. Osborne Jr., PhD retired from his role as Board chair in February 2022. We thank him for his commitment to advocating for nonprofits to get the support they need to advance their missions.

As of June 30, 2022
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